

## **5.2 Training approach**

### **5.2.1 Training Goals and Objectives**

The End-user Training Strategy is based on several guiding principles common within the training industry as well as experiences and lessons learned from similar large-scale Enterprise Resource Planning (ERP) training efforts for public sector organizations. As highlighted in the introduction, the overall goal for a successful training program is to deliver quality training to the right people at the right time. The strategies and practices outlined below support this overall goal and will be continually addressed as the project refines the overall change management and training approach:

- Achieve high course attendance through proactive policy establishment, communications, attendance tracking, and working closely with agency leadership
- Provide end-users with a clear understanding of:
  - The purpose, importance, and benefits of adopting the SCEIS solution and new business processes
  - The “To-Be” or future business processes
  - Role requirements (i.e., "who will do what") at Go-Live and beyond
  - How to use the system through hands-on exercises and access to a sandbox
  - Integration across role and functional areas
  - The impact of their role on the process
  - How to find appropriate help
- Ensure the learning experience simulates on-the-job activities via relevant exercises and practice work
- Produce role-based learning curriculum
- Validate role-based curriculum and schedules with mid-level managers to ensure relevancy, gain support and meet business needs
- Develop a sustainable learning approach to refresh skills and meet needs of new users
- Achieve executive support to mandate attendance for end-user training prior to Go-Live, thus ensuring user preparedness

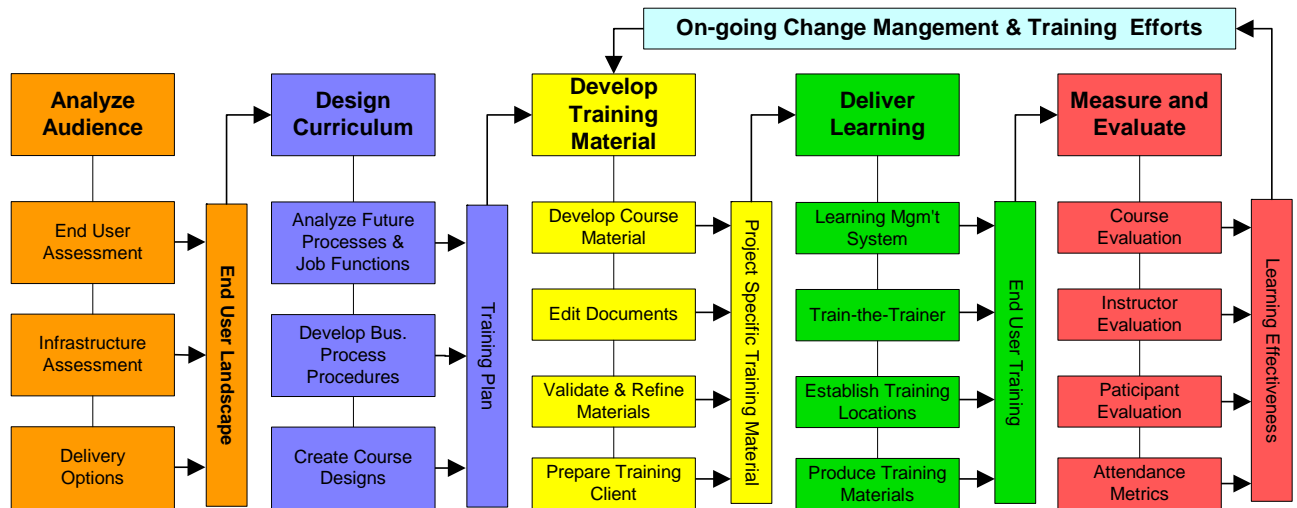
- Classroom training is preferred solution when logistics allow (e.g., location of users, availability of instructors and classrooms, etc.)
- Provide State-specific "help" to the end-users that is accessible within the SCEIS solution
- Provide a website to end-users to reference learning activities, documentation, policies & procedures

### **5.2.2 Training Methodology**

Effective and adequate training, in combination with a quality change management program, will help employees adapt to the new SCEIS solution. The training methodology detailed in this section will guide the process of creating the appropriate training curriculum and ensure that end-users receive training that is appropriate to their job in the new environment. It will also create a consistent and organized training approach to facilitate the many rollouts of the SCEIS solution. The overall methodology recommended to assess and deploy learning for the SCEIS project is summarized below.

Exhibit 4.2.2 – 1 demonstrates the recommended key steps, as shown in the first box at the top of each column. Supporting these steps are the activities listed in boxes below the first box, culminating in a targeted outcome for each step (vertical boxes). This result becomes an essential input for the next key step. Together, these steps, activities, and outcomes form the SCEIS Training Methodology.

*Exhibit 5.2.2-1 Training Methodology Applied*



### ***Step 1: Analyze the Audience***

The first step in the training methodology is to assess and analyze the potential SCEIS user community. In conjunction with other change management activities, the purpose of this step is to gain a better understanding of the current skills and job functions of end-users in each agency. In addition, information will be gathered on the current training environment. The activities listed in this step will need to be conducted for each agency, and components will be included in the Agency Implementation Plan. Much of this information will be gathered by administering an end-user questionnaire that is detailed later in this section. Listed below are the activities for the Analyze the Audience step.

#### **Activity 1: Conduct End-user Assessment**

- Identify end-users – determine who the “core” or power users are that will utilize a professional license
- Analyze end-user location – determine if the majority of users are in one central location or dispersed in satellite offices throughout the State
- Conduct End-user Assessment (described in Agency Implementation Plan section below)
- Determine any learning gaps which may impact success of end-user learning curriculum

### Activity 2: Conduct Infrastructure Assessment

- Identify current training environment – focus on the training resources and facilities that are currently in use within the Agencies
  - Trainers
  - Training organizations
  - Training facilities, including number of classrooms, number of machines, and network capabilities
  - Standard delivery mechanisms – determine how training is “normally” conducted within the agency

### Activity 3: Evaluate Delivery Options

- Determine the types of learning instruction that are applicable to the State; ensure the technical capabilities exist to support the varied training options and that the learning methods will be received well by employees.
  - Classroom
  - E-Learning
  - Self-paced
  - Computer-based

### Outcome

The Analyze the Audience step provides the Change Management/Training Team with a clearer understanding of the overall end-user landscape. This enables the design of an effective, targeted Training Curriculum.

### ***Step 2: Design the Curriculum***

Based on the information collected in the Analysis step, the Change Management/Training team will begin to define specific end-user needs and define the course curriculum. Outputs from this step will include an overall recommendation for the development of the State’s training solution.

### Activity 1: Analyze Future Business Processes and Job Functions

- Review Business Blueprint document
- Analyze Business process diagrams/flows

- Evaluate Workforce Impact Assessment which compares current “As-Is” job functions to future “To-Be” job functions
- Review SAP security roles created by the functional teams
- In conjunction with the Agency Implementation Plan, meet with subject matter experts to clarify the change from today’s environment to the future SCEIS environment

#### Activity 2: Develop Business Process Procedures

- Review the Business Process Master List (BPML) – this document defines the functional scope of the implementation
  - Identify Business Process Procedures (BPPs) to be created
- Employ RWD Info Pak® tools to create BPPs (refer to section 4.3, Training Tools and Documentation, for more information)

#### Activity 3: Create Course Designs

- Develop end-user curriculum – best practice is to use a role-based curriculum that trains end-users based on the SAP security roles that have been assigned to their position; this type of curriculum approach focuses trainees on what they need to know in order to perform their new/changed job functions
- Create Course Designs – outline the learning objectives and SAP transactions to be covered in each course

#### Outcome

The result of the Curriculum Design activities will be the development of a detailed Training Plan. This Plan will identify specific courses and learning objectives for the SCEIS solution and provide an overview of the training content to be developed and the delivery method for the various types of content proposed. In addition, the Plan will detail other logistics such as the train-the-trainer strategy, trainer staffing plan, training enrollment and tracking process, and training assessment and metrics. More information about the Training Plan is included in Section 4.5.2.

#### ***Step 3: Develop Training Materials***

Several types of training materials and content will be built by the project to support the training and education of state employees in using the new SCEIS solution. The materials prepared will fit the training needs of the users as identified in the earlier steps of this methodology. The specific

course materials and the document review and approval process is outlined below and further detailed in Section 4.3 of this document.

#### Activity 1: Develop Course Materials

- Participant materials
  - Work Instructions
  - Concepts
  - Simulations
  - Exercises

#### Activity 2: Edit Documents

- Run Preliminary document through RWD Info Pak® Glossary
- Conduct Editorial Review

#### Activity 3: Validate and Refine Materials

- Power Users and functional team validate training materials
- Update materials as appropriate

#### Activity 4: Prepare Training Client

- Work with Technical Team to prepare training environment and develop training client management plan
- Develop exercises using real test data that has been copied from the future production environment
- Determine appropriate refresh schedule for training client

#### Outcome

The Develop Training Material step will result in detailed, project specific training materials, forming the essential foundation to prepare the SCEIS project for conducting end-user training.

#### ***Step 4: Deliver the Learning***

The delivery of training must be organized and useful to the end-user. “Just-in-time” training is recommended so that employees are able to retain knowledge between the training experience and its practical application to their daily work. This timely training should occur approximately

4-6 weeks ahead of go-live, with consideration given to the most complex and operationally critical processes prioritized closest to go-live. The following activities should be included in this step.

Activity 1: Develop a Learning Management or Scheduling and Tracking System

- Develop a system to schedule courses and track course attendance
- Schedule courses 4-6 weeks before go-live
- Determine the amount of flexibility in allowing end-users to select the time and date of their course
- Identify project resource to be the Training Coordinator and coordinate training schedule and delivery logistics

Activity 2: Implement Train-the-Trainer Approach

- Determine Train-the-Trainer strategy including number of Agency trainers needed and their involvement with the project
- Solicit and retain essential, credible Subject Matter Experts or “power users” to become trainers
- Conduct Train-the-Trainer course
- Conduct dry-runs of instructor led courses

Activity 3: Establish Training Locations

- Reserve physical location for training delivery
- Ensure facilities have sufficient lead time for scheduling of instructional areas
- Schedule the appropriate number of facilities based on the number of courses
- Determine SCEIS technical training environment and ensure facility can support it
- Assess network access to training servers
- Develop network/application logins for end-users
- Ensure appropriate roles are assigned to end-users

#### Activity 4: Print and Produce Training Materials

- Coordinate logistics for printing of all paper-based materials for student and instructor manuals for use in classroom training courses
- Ensure on-line content can be accessed appropriately

#### Outcome

The activities supporting the Deliver Learning step result in the quality end-user training necessary for each wave and rollout. The effectiveness of this training is measured in the next step.

#### ***Step 5: Measure/Evaluate the Learning***

Measurement is a key component to assure the success of any project. In terms of training, this measurement may be based on assessments and evaluations. Several types of evaluations will be used at the end of each course to determine the value and effectiveness of the project's training efforts. In addition, the project leadership will need to determine what level of proficiency (mastery) will be necessary in order to receive access to the system. At minimum, it is strongly recommended that end-users do not receive access to the SAP system until they have attended and fulfilled all of their training requirements. These types of metrics will be included in the overall Readiness Assessment of the agency prior to go-live. The below items describe the minimum training assessment requirements.

#### Activity 1: Course Evaluations

- Determine that the content of the course was adequate and appropriate
- Compare course evaluations against defined metrics of success and make corrections as necessary

#### Activity 2: Instructor Evaluations

- Assess the end-users satisfaction with the instructor and the learning methods utilized during the course

#### Activity 3: Participant Evaluations

- Conduct instructor debrief to determine if information gathered during the Analysis step pertaining to the end-user landscape was accurate, such as the level of end-user computer skills and role based curriculum.



- Evaluate end-user responsiveness during class and assess their ability to complete classroom exercises

#### Activity 4: Evaluate Attendance Metrics

- Ensure end-users have attended training prior to go-live
- Determine if end-users have accessed and used the training sandbox

#### Outcome

These activities allow the project to assess the effectiveness of the learning and improve the courses where appropriate. The data collected supports on-going Change Management/Training efforts and will be used to enhance each step in successive waves of functionality release.

### **5.2.3 Agency Implementation Plan**

As detailed in the Business Blueprint, the Agency Implementation Plan describes the applicable items that will be reviewed during the implementation phase of each agency in the rollout schedule. The Plan identifies the items that each agency will need to consider for their rollout of SCEIS.

The Change Management team has identified specific items to be gathered and discussed for each agency that will be included in the Agency Implementation Plan. The majority of these items will be addressed through an end-user questionnaire that will focus on employees' current job functions and computer literacy. In addition, the Change Management Team will coordinate with the Technical Team on conducting an Infrastructure Assessment to identify the current training environment. The following list details the information that will need to be gathered for each of these assessments:

#### ***End-user Assessment***

- Determine number, location, and type of users involved (core users who will need a Professional license versus casual users who will only need an Employee Self-Service license)
- Distribute End-user Questionnaire to assess the following for each end-user:
  - Current roles and responsibilities
  - Computer/network access
  - Computer/software experience

- Computer training
- Business application experience
- Skills assessment

***Training Infrastructure Assessment***

- Determine if standard training policies and procedures exist for the following:
  - Desktop standards
  - Content delivery
  - Scheduling/Learning Management Systems
  - Document control capabilities
  - Other training tools and facilities
- Assess current training resources
  - Trainers
  - Training Organizations
  - Classrooms
  - Equipment (computers, monitors, etc)
  - Network capabilities